



Policy Manager Review Date

Overview

Outdated policies can leave your organization at risk. It is essential to proactively review the policies and procedures on a regular basis. When creating a policy manager, or editing an existing policy, you can set a review Date as one of the policy manager attributes.

Set review Date

☐ Recall this policy

Owner* x Browse

Author* x Browse

What is the review date?

The review date (if created) will be displayed when viewing policy details as shown below.

Policy Manager > Policy Details

POICIES
CP-ACB - Anti Corruption and Bribery Policy
Distribution Policy version 1 Accepted ISO9001

It is our policy to conduct all of our business in an honest and ethical manner. We take a zero-tolerance approach to bribery and corruption and are committed to acting professionally, fairly and with integrity in all our business dealing and relationships wherever we operate and implementing and enforcing effective systems to counter bribery and corruption.

Review Date 14 November 2022

+ Create New Version

Edit Properties

Acceptance Status

Who receives notification when the review date is due?

The policy owner and author (if they are different) are going to receive 2 sets of notifications when it comes to reviewing an existing policy or procedure.

1. Policy Review Reminder `policy.review_reminder`

This notification will be sent 15 days prior to the review date.
Currently, the number of days is fixed and it is not yet possible to customise.

2. Policy Review Date `policy.review_due`


This notification will be sent on the day it is due to review.


Can I customise the notification template?


It is possible to customize the notification template providing you have access to the System Admin panel by navigating to:


Admin > System > Localisation > Edit notification templates


Under **Policy manager**, select appropriate language to customise the template Subject and Body.


 Admin


 General


 Administrators

 License


 Date and Time


 Background Services


 Localisation


 Labs

INTEGRATIONS

 Scripts

 API keys

 Mailgun

 LDAP

Admin > System > Localisation > Edit notifications > Policy Manager (English) > policy.review_due

Edit Notification

Editing the notification template "policy.review_due"

Language

English

Template subject

1 {{ ref_code|raw }} {{ title|raw }} Stage: {{ stage_title|raw }} requires y

Template Body

1 The review date for the following policy is going to expire today:

2

3 {{ ref_code }} {{ title }}

4 {{ description }}

5 Created by {{ creator }}

6 Owner {{ owner }}

7 Category: {{ category }}

8

9 Click the following link to view:

10

11 {{ title }}

12

13

14 =====

15 This email is generated by Policy Manager Application.

16

Last modified on 1 December 2023 by Hannah Door
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Tags: date, policy, review